FISCal N

One state. One system.

User Community Forum

September 2017





Will Padilla

FI\$Cal Change Management Office

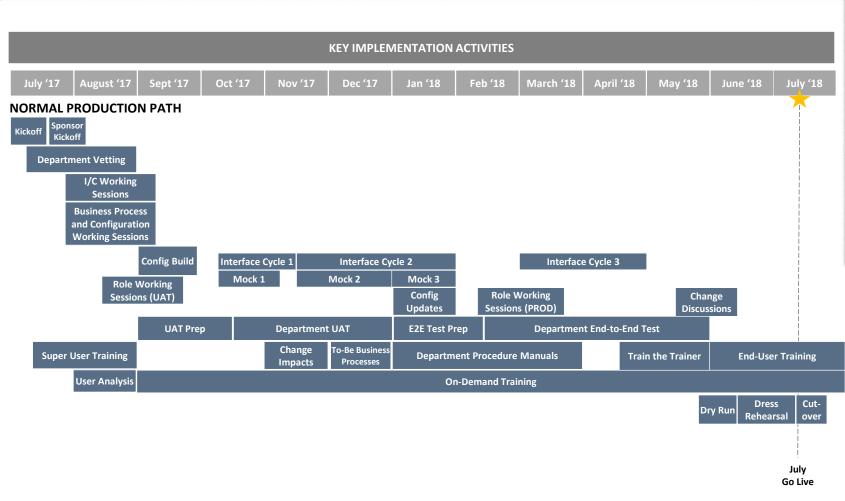


Agenda

- 2018 Release Update
- Change Management
- Job Aids and User Support Labs
- FI\$Cal Service Center
- Close



2018Timeline





2018 Release Update

- Done or in progress:
 - Department Vetting
 - Interface/Conversion Working Sessions
 - Business Process and Configuration Working Sessions
 - Role Mapping Working Sessions
- Upcoming:
 - Interface Cycle 1/Mock 1
 - Department UAT
- Ongoing:
 - Training



Change Management

Commitment Curve

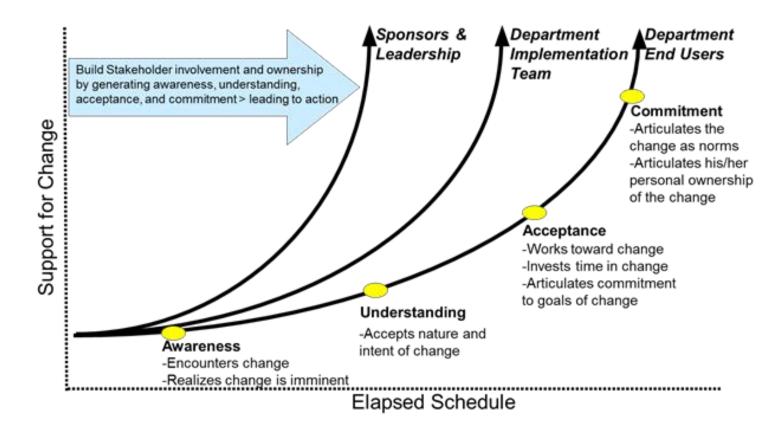
 Inform stakeholders Inform stakeholders how Inform stakeholders about Inform stakeholders of they will work with the new Communicate project theupcoming key project milestones timeline, intended changes implementation Communicate is sues Communicate system and Communicate all rollout and resolutions audience, and system to business process changes Inform stakeholders of be implemented activities Inform stakeholders of Inform stakeholders about Inform stakeholders of ongoing support where they can obtain training to be provided training timeline and processes program information enrollment process Change Commitment Curve Acceptance Commitment Understanding Explain changes to the Explain the benefits business processes **Awareness** Use the new system to do Explain the impact to their Explain how it will be theiriob role implemented Participation in support Understand the need for Explain how they will use it activities and followup change to do their jobs Explain the goals, purpose. Use change network to and rationale for the project communicate key change Explain the benefits measures



Change Management

- Awareness: Encountering the change and realizing its imminence
- Understanding: Comprehending the nature of the change and its impact
- Acceptance: Expressing a willingness to perform as the change requires
- Commitment: Demonstrating a personal ownership and endorsement of the change.







Anthony Ampania

University of FI\$Cal



2017 User Support Labs

- Began July 25, 2017
- One department (1) Super User (Super User <u>is required</u> to attend and must have completed the required training)
- Up to three (3) additional end users who have completed the required training
- 11 Departments have participated to date
- Note: Required training must be completed for each USL participant prior to submitting the USL Request Form



Future USLs

Year round beginning October 3, 2017

Topic	Day of Week	Hours
PO/AP	Tuesday	9:00 AM – 12:00 PM 1:00 PM – 4:00 PM
AR/BI/CM/PC	Wednesday	9:00 AM – 12:00 PM 1:00 PM – 4:00 PM
GL/COA	Thursday	9:00 AM – 12:00 PM 1:00 PM – 4:00 PM
Open Session	Monday/Friday	9:00 AM – 12:00 PM 1:00 PM – 4:00 PM



Job Aids

 Supplemental Job Aids are end user training resources communicating step-by-step instructions on how to complete specific transactions in FI\$Cal not covered in the University of FI\$Cal. FI\$Cal Training Tips include FI\$Cal End User Frequently Asked Questions and helpful FI\$Cal End User Tips and Tricks for navigating in the System.



New Job Aids

- FI\$Cal.345 Purchase Order FAQs, Version 1.0
- FI\$Cal.346 P-Card FAQs, Version 1.0
- FI\$Cal.347 Receiving FAQs, Version 1.0
- FI\$Cal.348 Requisition FAQs, Version 1.0
- FI\$Cal.349 Procurement Contract FAQs, Version 1.0



New Job Aids

- FI\$Cal.350 General Procurement Tips FAQs, Version 1.0
- FI\$Cal.351 Accounts Payable FAQs, Version 1.0
- FI\$Cal.352 Events/Solicitation (California State Contracts Register-CSCR) FAQs, Version 1.0
- FI\$Cal.353 State Contracting and Procurement Registration System (SCPRS) FAQs, Version 1.0
- FI\$Cal.354 Procurement Approval Workflow FAQs, Version 1.0

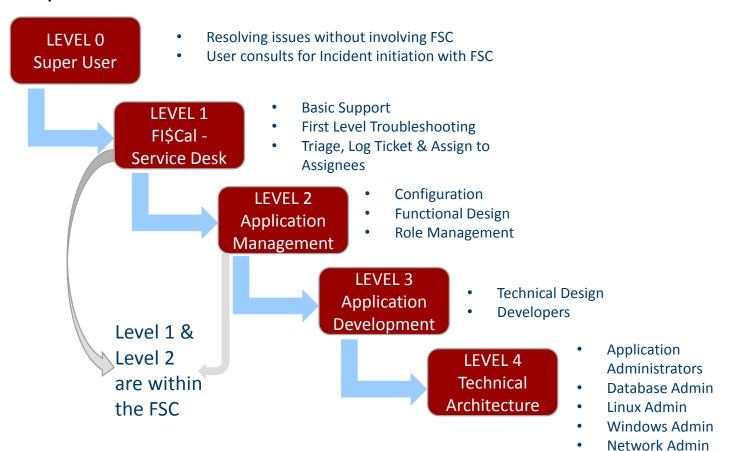


Maureen Rielley, FSC L1 Blanca Mendoza, FSC L1 Marlon Lewis, FSC L2

FI\$Cal Service Center



FI\$Cal – Structure and Services





FI\$Cal Service Center (FSC)

Mission

To serve the best interest of the State and its citizens by providing excellent support and services to the FI\$Cal customers.



Customer Service & Analytics Section (FSC Level 1)

What we do...

- Your main point of contact for new issues and tickets
 - We will resolve the incident immediately if possible.
 - If we cannot, we perform the initial evaluation, triage and prioritization of incidents then route to the proper team(s)
- FSC Analytics and Reports
 - Daily, weekly, and monthly statistics, reports, and presentation decks
 - Analyze trends and triage critical issues

Contact Information

Email: fiscalservicecenter@fiscal.ca.gov

Voice: (855) FISCAL0 (347-2250)

Web: http://www.fiscal.ca.gov/access-fiscal/



FSC - Things to do, speed up resolution

- Advise user to clear cache and retry process (as part of incident triage)
- Contact your department Super User to attempt resolution
- Providing the following information speeds up incident processing:
 - Steps leading to the issue
 - FI\$Cal User ID (some Users have multiple ID's)
 - Relevant Screenshots include URL; Menu Breadcrumbs; Date/Time
 - Affected User's Contact Information recommend affected user be the customer contact on incident, not Super User
 - If Budget issue identify whether in Hyperion or PeopleSoft
 - Provide BU & clear description of issue/request in email Subject Line
 - BU + MEC/YEC in email Subject Line for MEC/YEC requests
 - Possible Workarounds
 - Providing this information at incident creation reduces the time for L2 to request additional information for clarification and analysis



FSC – Data Privacy

Be Careful Sharing Data

- Do not share your login credentials with anyone
- Do not email sensitive or confidential data to FSC
- Consider what you are sending ensure confidential data is not contained in a screenshot or image
- If your problem involves sensitive data, please call the FSC for assistance in redacting the data prior to submission
- Consider requesting a WebEx session which may speed up issue resolution



Business & Functional Services Section (FSC Level 2) What we do...

Your team of analysts providing functional support

- We perform research of reported incident
- We work with internal FI\$Cal service teams to determine if the system is functioning as designed, or to perform a fix to the system
- If we determine that the request is not business function related, we triage with appropriate internal FI\$Cal service teams to resolve the incident
- Keep open communication as we address your ticket
- Business Services
 - Assist with business services such as releasing vouchers within a stuck status
 - Assist with processes related to closing
 - Collaborate with internal FI\$Cal service teams to address MEC/YEC related tickets



System Enhancements (Change Request) Workflow

Level 1 Intake (Incident)

Customer contacts FSC to Open ServiceNow incident

- L1 Support Agent will capture all conversation and requirements
- Complete incident
- Assign the incident to appropriate analysis team for resolution

 Telephone INTERVIEW with submitter/user

 Email communications including department Super User

Level 2 Triage

- L2 Analyst will review ServiceNow incident
- Perform AS-IS analysis
- Research FDs and UPKs for accuracy
- Contact customer/ submitter
- Update FD to TO-BE functionality
- Assist customer in completing Request For Change (RFC) form
- Present to
 Enterprise Intake
 Triage Committee
 (EITC)

 Telephone COLLABORATION with submitter/ user

Enterprise Intake

EITC decides
 Production
 Enhancement
 Lifecycle (state tech team) or will advance through the Project
 Enhancement
 Lifecycle (change Request for Accenture)



- Cost analysis
- Statewide impact assessment
- Scheduling
- Email and telephone UPDATE with submitter/ user
- Communication with project manager
- ODMF Decisions

Build, Acceptance & Deploy

- Solution development
- Unit testing
- Functional testing with developers
- L2 Support will Coordinate User Acceptance Testing
- Gain acceptance/ approval from Super User and/or submitter
- L2 Support represents delivery through Enterprise Release Board
- Telephone UPDATE with submitter/ user and REQUEST for APPROVAL
- RELEASE NOTES from Weekly Release Board Meeting
- ServiceNow incident CLOSURE

Communication

Workflow



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